USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

Voluntary _ Public

Date: 4/17/2017

GAIN Report Number: SP1708

Spain

Post: Madrid

Fish and Seafood Market Brief

Report Categories:

Fishery Products

Product Brief

Approved By:

Rachel Bickford, Agricultural Attaché

Prepared By:

Arantxa Medina, Marketing and Management Assistant

Report Highlights:

Spain is one of the largest markets worldwide for fish and seafood. In 2016, Spain was the fourth largest importer of fish and seafood in the world after the United States, Japan and China. Spain not only has the largest fish processing industry in Europe, but also has a high per capita consumption and a high per capita expenditure on fish and seafood products. Furthermore, Spanish fish and seafood production through commercial fishing and aquaculture is not sufficient to meet domestic demand and imports remain a key element in meeting market demand. Top sellers from the United States in 2016 included lobsters, surimi, Alaska Pollock and squid.

INDEX

SECTION I: SPAIN SEAFOOD MARKET OVERVIEW

Spain is a net importer of fish and seafood and sources from ninety-five countries around the world. In 2016, Spain's imports of fish and seafood from all origins were $6.33 billion, up 12.52 percent from $5.62 billion in 2015. The United States was the sixteenth largest exporter of seafood products to Spain. The largest seafood supplying country in 2016 was Morocco at $592 million, followed by Argentina at $460 million, and France at $459 million. Total imports from the United States were valued at $134 million, almost the same amount as previous year. The first ten countries of origin accounted for fifty-six percent of Spain's total seafood imports in 2016.

Total Spanish exports in 2016 reached $3.15 billion, up just over nine percent compared to previous year. Imports are expected to continue to outpace exports ensuring that Spain remains an important market for all U.S. seafood suppliers.

Spain is the third largest fish and seafood consumer in the EU, with 46.2 kg per capita per year. Fish and seafood hold a significant place in the traditional diet and are viewed as a healthy and nutritious habit. Fish is consumed in all the possible ways: fresh, frozen, processed, in brine, even raw due to the fashionable Japanese influence. All these factors put together create interesting opportunities for U.S. exporters of all kinds.

SECTION II: SUPPLY, DEMAND AND MARKET OPPORTUNITIES

The European Union (EU) fleet is very diverse, with the vast majority of boats being no more than 12 meters long, with very few vessels exceeding 40 meters in length. The EU's fishing fleet capacity has declined significantly since the 1990's, both in tonnage and engine power. The size of the EU-28 fishing fleet has dropped to about 84,400 vessels in 2015 compared to 95,200 for the EU-15 in the year 2000.

Table 1. Fishing Fleet 2000-2015 – Number of vessels

	2000	**2005**	**2010**	**2015**
Greece	19,556	17,881	16,913	15,393
Italy	17,367	14,396	13,431	12,325
Spain	16,685	13,706	10,855	9,408
Portugal	10,677	9,105	8,425	8,054
France	8,229	8,239	7,216	6,911
United Kingdom	7,739	6,784	6,460	6,225
TOTAL EU*	**95,240**	**88,852**	**83,374**	**84,356**

Source: Eurostat

* EU-15:2000; EU-25:2005; EU-28:2015

In terms of national origin, 18.2 percent of the EU's fishing fleet is registered in Greece, most of these vessels are small, with an average size of 4.7 tons, far from the EU-28 average of 18.9 tons. In terms of capacity Spain, France, Italy and the United Kingdom had the largest fishing fleets, accounting for 53.9 percent of the gross tonnage and 55.6 percent of the engine power in 2015.

Table 2. Tonnage of the Fishing Fleet 2000-2015 – Total Gross Tonnage, TMT

	2000	**2005**	**2010**	**2015**
Spain	521	489	415	343
United Kingdom	265	218	207	188
France	226	220	173	172
Italy	234	214	185	158
Netherlands	212	171	147	127
TOTAL EU*	**2,030**	**2,022**	**1,749**	**1,594**

Source: Eurostat

* EU-15:2000; EU-25:2005; EU-28:2015

The Spanish fishing fleet is made up of around 9,500 vessels, the 3rd largest in the EU with Galicia representing almost 50 percent of all vessels followed by Andalusia, Catalonia and the Canary Islands. In terms of value, the most important fish species are tuna, albacore, and needlefish followed by coastal fish; cod, hake, herring, sardines, and anchovies. Crustaceans and mollusks consisting of prawns, shrimp, squid, cuttlefish, and octopus are ranked third.

Production

Fishing Sector

In the EU-28, the four largest fishery producers in terms of volume in 2014 were Spain (1.4 million live weight tons), the United Kingdom (1.0 million live weight tons), Denmark (0.8 million live weight tons), and France (0.7 million live weight tons).

Table 3. Total Production of all fishery products 2000-2015 –TMT live weight

	2000	**2005**	**2010**	**2014**
Spain	1,296	938	995	1,394
United Kingdom	895	838	807	967
Denmark	1,578	950	860	779
France	959	831	643	744
Netherlands	569	618	443	439
TOTAL EU-28	**7,888**	**6,774**	**6,271**	**6,653**

Source: Eurostat

About 80 percent of the EU-28's total fishery production relates to catches.

Table 4. Total Catches 2000-2015 –TMT live weight

	2000	2005	2010	2015
Spain	987	717	742	902
Denmark	1,534	911	828	869
United Kingdom	743	665	605	702
France	692	586	440	497
Netherlands	494	547	376	365
TOTAL EU-28	**6,483**	**5,496**	**4,999**	**5,113**

Source: Eurostat

Processing Industry

In Spain, the fishery and aquaculture products manufacturing industry has a great socio-economic importance, especially in areas highly dependent on fisheries, such as Galicia, Cantabria and the Basque Country. In these and other regions, there has been an important development in industrial activity of fishery products that placed Spain to lead production in the European Union and to be the second largest producer of canned fish and seafood in the world, and the first of the EU in the frozen fish sector.

Table 5. Fish and seafood processing products 2014-2015 –quantity and weight

	2014		2015	
Product	**Quantity (MT)**	**Value ('000 USD)**	**Quantity (MT)**	**Value ('000 USD)**
Fresh or refrigerated fish	21,639	113,218	17,202	108,162
Frozen fish	180,250	527,600	177,741	521,981
Dried, salted, brined or smoked fish	31,519	359,065	33,497	375,356
Prepared or Canned Fish (except ready meals)	366,704	2,111,090	395,124	2,156,460
Frozen Crustaceans (including cooked, but not peeled)	42,384	311,765	37,865	284,230
Frozen Mollusk (even dried or in brine)	109,502	437,259	108,994	499,998
Prepared or Canned Mollusks	2,946	24,018	3,714	25,771
Prepared or Canned Crustaceans	71,268	362,229	72,876	375,131
Flour, paste and fat not intended for human consumption	37,869	37,518	42,275	46,222
Waste	47,543	5,967	47,075	6,788
TOTAL	**1,775,705**	**8,236,814**	**1,825,651**	**8,448,077**

Source: MAPAMA

In general, the manufacturing industry of fishery products and aquaculture in Spain has the following characteristics:

- A leading sector, both at a worldwide and European level in the processing and marketing of fishery and aquaculture products. Spain is the largest producer in the EU
- A sector with great tradition, experience and know-how
- Modern and competitive after the important investments made in recent years
- Renowned for its high standards of quality and image of its products in international markets
- Consumer base strongly committed to healthy eating and sustainability
- An internationalized sector, both exporter and importer of raw materials, highly competitive, whose products are commercialized worldwide
- A sector that invests on innovation and the development of new products to adapt to changing consumer habits
- Also focusing on innovation in food quality and safety, improving processes and developing new products, optimizing productivity
- Almost 20,000 people are directly employed by this industry
- Comprised of large, branded companies and high degree of specialization, automation and full integration of the productive process

Aquaculture Sector

The three largest aquaculture producers in the EU are Spain, the United Kingdom and France. These three countries account for more than half of total aquaculture production in the EU-28 in 2014.

According to the Ministry of Agriculture and Fisheries, Food and Environment (MAPAMA), aquatic production in Spain was valued at 623 billion dollars in 2015. The aquaculture sector is broadly diversified in terms of species and farming technologies, and around thirty species are cultivated. Although the trend has been towards consolidation in recent years, the industry is still dominated by small to medium-sized farms. The main production area is Galicia, followed by Andalusia, Asturias, the Balearic Islands, the Basque Country, the Canary Islands, Cantabria, Catalonia, Murcia, and Valencia.

In Spain, around ninety percent of farmed fish production is marine aquaculture, with the remaining ten percent being inland aquaculture, mostly trout. In 2014, approximately seventy-two percent of total farmed fish production by weight in Spain involved mollusks, including mussels, oysters, clams and cockles. The production of mussels is the main category within mollusks, with more than ninety-five percent of production occurs in Galicia. Around seventeen percent consisted of fish such as sea bream, European sea bass, turbot and rainbow trout. Galicia, which is located on Spain's northwest coast, remained the leading region in Spain for aquaculture and fish farming, notably for the farming of turbot and sea bream. The remaining production included forty-two different species.

Table 6. Spain's Aquaculture Production by Species in Value ('000 USD)

	2013	2014	2015
Fish	420,532	447,468	479,392
Crustaceans	273	561	1,192
Mollusks	105,885	133,359	141,808
Other invertebrates	4	26	11
Aquatic Plants	809	732	762
TOTAL	**527,503**	**582,146**	**623,165**

Source: MAPAMA

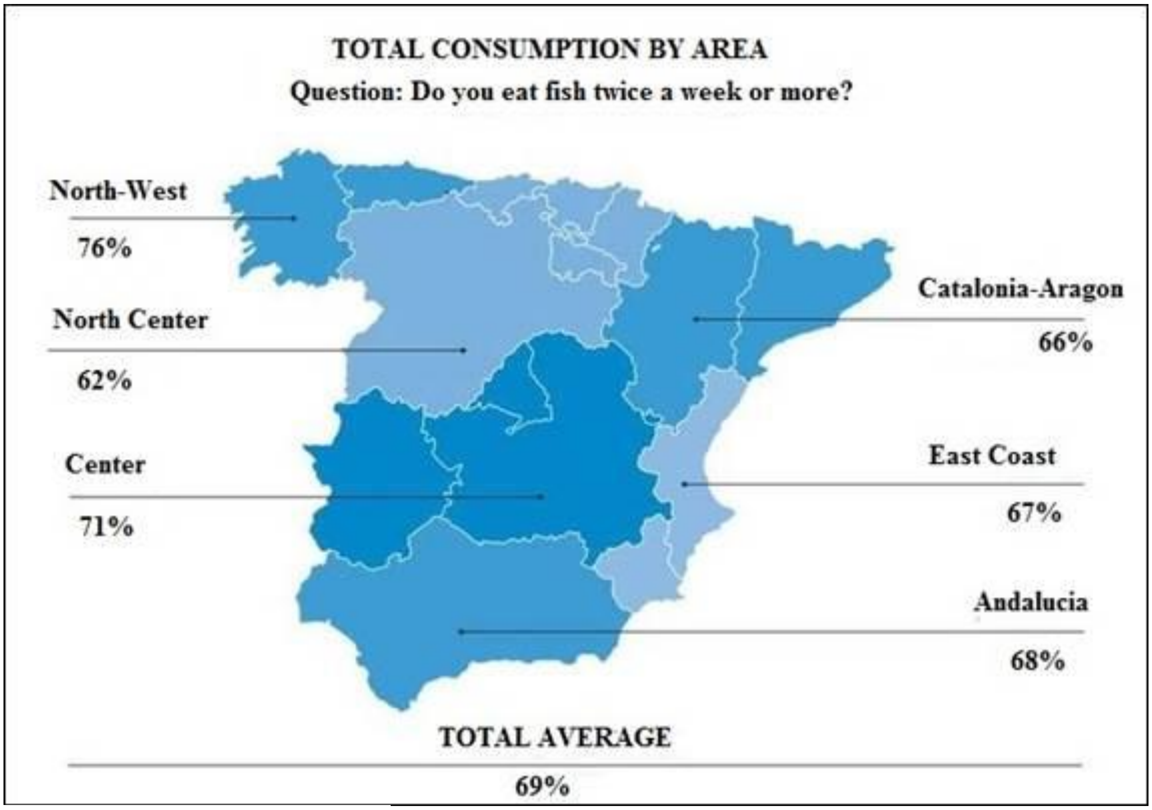
In 2015, the Spanish farming of marine fish included species such turbot, seabass, seabream, gilthead bream, sole and even red tuna. In addition, the freshwater fish sector included rainbow trout and small volumes of eel and sturgeons. The production of mussels is the main category within mollusks, with more than 95 percent of production occurs in Galicia.

In recent years, the aquaculture industry has invested in diversification in new species, focusing to high added valued species. Tuna and yellowtail are among the species considered as species of interest and potential in the Spanish aquaculture sector.

Consumption

Spain leads the European countries in terms of the consumption of fish and seafood, with consumption of 46.2 kg per capita annually, only behind Portugal and Lithuania. Despite Spain's economic recovery and good macroeconomic numbers, recent changes in the eating habits of many consumers, who had to adjust to the economic recession and the high unemployment rate, continued to constrain the consumption of more expensive products, such as seafood and crustaceans, both in the retail and foodservice channels.

Fresh fish is considered to be superior quality to processed alternatives. The competition from processed fish in terms of affordability and availability continues to compete with fresh fish, but generally, as soon as consumers' finances improve, they move back to consume fresh product. In Spain, consumers eat fish and seafood very regularly, often several times a week, and many traditional dishes include fish and seafood.



Source: TNS Gallup/NCS, 2015

Some sociodemographic and economic patterns continue to influence the domestic consumption of fish and seafood. According to the FROM, the public authority that regulates Spanish fisheries and fish distribution, per capita consumption of fish in households with members over 65 years old is more than double the per capita consumption in homes with members under 50 years old. Doctors often advise elderly patients to limit the ingestion of red meat and substitute it for white fish and fish is perceived as healthy. 75 percent of people between 50 and 65 eat fish at least once a week. This number contrasts with 37 percent of younger people who admit to never eating fish. The lower purchasing power and the new lifestyles (lack of time to cook and queue at the fishmongers, lack of knowledge of how to cook the product, etc.), are challenges that fish consumption is facing. Only sushi and salmon have managed to seduce the younger generations.

The most popular species in the shopping cart are hake, salmon and cod, followed by shrimp and seabass. In all these cases distributors made a great effort to offer a wider variety of cuts and fish preparations.

Table 7. Spain's Sales of Fish and Seafood by Category (1,000 M/T)

	2010	2011	2012	2013	2014	2015
Crustaceans	183.6	184.7	183	175.7	169.2	166.7
Fish	855.7	842	824.3	802.9	770	760
Mollusks and Cephalopods	315.3	294.2	292.5	283.4	276.5	269.2
Fish and Seafood	**1,354.60**	**1,320.90**	**1,299.80**	**1,261.90**	**1,215.70**	**1,195.90**

Source: Euromonitor International

Two factors are likely to positively impact the total volume of sales in the medium term: the ageing of Spanish population and the increasing importance of personal health and wellbeing. Increasing competition from packaged and prepared fish and seafood is expected to intensify, which will increasingly constrain volume sales. This is predominantly true for canned/preserved fish/seafood, due to its convenience and the popularity of special offers in supermarkets and hypermarkets.

Distribution

In the Spanish retail sector, fresh products, including fish, is strategic to attracting customers. The large distribution is gaining more and more market share compared to the traditional channel, as major grocery chains offer quality at competitive prices. Logistical improvements and the removal of intermediaries, as well as the distribution capacity to adapt to the geographic areas and a closer collaboration with the primary sector, are the pillars on which this greater competitiveness is based.

Table 8. Spain's Fish and Seafood Consumption by Channel: (% Total Value) 2015

	Hypermarket	Supermarket	Discount	Traditional Shop	Other	eCommerce
Fresh fish	10.1	48.3	2.3	35.8	3.4	0.4
Frozen fish	8.8	49	13.9	20.8	7.5	0.6
Seafood (Mollusks/ Crustaceans)	11.5	49	6.2	29.2	4.2	0.4
TOTAL FISH	**12.1**	**49.1**	**7.4**	**27.1**	**4.4**	**0.5**

Source: Alimarket

Shortening the time between the production and the availability of the product in the store is the way to improve the quality and to reach customers with the maximum freshness. The fresh fish and seafood sections have challenges and require major distribution efforts, being the most perishable product and, therefore, the most difficult to manage; but at the same time, being the most strategic and differentiating category. Large grocery chains tend to have a presence in fish auction markets spread all over Spain and the purchase of supplies is carried out on a daily basis. Mercadona for instance, has revolutionized the fish supply operation since the creation of its new data processing center. A "computer brain" that allows to place orders in real time, connecting each of the supermarkets with the fish markets (working with 180 fishermen's associations) directly, even with boats that operate on the high seas. This computer program was an investment of $47 million USD, within the project of digital transformation of the company, towards which Mercadona allocated $133 million USD.

Other retailers, Lidl and Aldi also modernized their models in order to respond to a consumer looking for competitive prices but also convenience when making the whole grocery purchase in the same establishment. So far, both chains have focused on the supply of fresh fruits and vegetables and packaged meat, and both chains have to incorporate pre-packaged fresh fish.

A good transport network is fundamental to guarantee the maximum freshness of the product. Major grocery chains, particularly those ones inside the supermarkets and hypermarkets, are renovating and expanding their over-the-counter fresh locally-sourced fish sales areas, which proved to have a positive response from consumers.

Table 9. Spain's Distribution of Fish and Seafood by Format: (% Total Volume)

	2010	**2011**	**2012**	**2013**	**2014**	**2015**
Retail	77.8	77.7	78.3	79	78.2	77.7
Foodservice	19.7	19.7	19.3	18.5	19.1	19.6
Institutional	2.5	2.6	2.5	2.5	2.7	2.7
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**

Source: Euromonitor International

According to Euromonitor, despite the growing presence of packaged products, especially in supermarkets and hypermarkets, unpackaged fish continued to account for the largest portion of total retail volume sales with an 83 percent share in 2015. Spanish consumers consider fresh fish to be of better quality and they like to see the product whole and fresh to make their purchase decision in order to assess freshness and quality.

This trend is demonstrated again by Mercadona. Between 2005 and 2008, the supermarket chain replaced the fresh fish and seafood counters in its outlets with pre-packed products. This decision triggered a sharp decline in sales, negatively impacting profits. In 2013, Mercadona changed its strategy to focus on fresh local fish and seafood with the aim of providing greater freshness and quality, and of course, increasing their sales.

Trade Shows

Conxemar
Dates: 4-6 October, 2016
Location: Vigo, Pontevedra
Frequency: Annual

Conxemar is the most important and international seafood show in Spain. Every year the Spanish Association of Wholesalers, Importers, Manufacturers and Exporters of Fish products and Aquaculture (CONXEMAR) organizes its International Frozen Seafood Exhibition. It takes place in Vigo, an important fishing port in Europe and serves as the meeting point for the entire processing branch, distributors, importers and exporters of frozen seafood products.

SECTION III: FISH AND SEAFOOD TRADE

Spain relies on imports, mainly from third countries, due to its high consumption numbers and the large capacity of the fish and seafood industry. At the same time the country is also a large exporter, mainly to the EU, which absorbs more than two thirds of Spanish exports.

Imports

In 2016, Spain's fish and seafood imports from all origins were $6.3 billion. The main imported category in 2016 was shrimps and prawns, followed by live mollusks, namely squid and octopus. The largest single seafood supplying country was Morocco, being the main supplier of octopus and squid.

Table 10. Spain Imports of Fish and Seafood by Origin in Value (Million USD)

Partner Country	2013	2014	2015	2016
World	**5,440**	**6,016**	**5,622**	**6,326**
Morocco	424	511	495	591
Argentina	476	465	435	460
France	427	428	411	458
Portugal	302	355	355	399
China	286	272	284	352
Netherlands	277	335	293	322
Sweden	191	221	213	269
Ecuador	203	255	231	262
Denmark	187	208	196	246
U.K.	227	260	230	244
Others	2,440	2,705	2,479	2,723

Source: GTA

The origin of Spanish fish and seafood imports in 2016 was the European Union. Within the EU, the main exporters of fish and seafood to Spain were France and Portugal. Outside the EU, the largest exporters were Morocco, the United States and Vietnam.

Spain imported $134 million of fish and seafood from the United States in 2016, consistent with the previous year. In Spain, U.S. seafood is generally considered high quality, but higher in price compared to that of competing countries. In 2016, the United States was the world's 16th largest exporter of fish seafood to Spain, improving from the 18th position in 2011. Live Lobster ($36.6 million), frozen surimi ($23 million), Alaska Pollock, ($17.4 million), squid ($16 million), hake frozen fillets ($11.6 million), frozen Albacore tuna ($7.8 million), and frozen Pacific salmon ($4.8 million) were among the most imported categories in 2016.

Table 11. Spain Value of Imports of Fish and Seafood Products ('000 USD)

	2014		2015		2016	
Category	**World**	**U.S.A.**	**World**	**U.S.A.**	**World**	**U.S.A.**
Live Fish	33,202	62	45,622	22	59,514	426
Fish, fresh or chilled, excl. fillets	1,168,469	421	1,085,621	180	1,197,362	12
Fish, frozen, excl. fillets	808,684	31,961	701,429	29,355	816,998	16,475
Fish fillets and other fish meat, fresh, chilled or frozen	826,302	43,632	735,353	51,474	806,712	52,729
Fish, dried, salted, smoked or in brine	247,073	1	240,125	1	235,995	427
Crustaceans, live, fresh, chilled, frozen, dried	1,493,719	40,486	1,390,240	36,148	1,441,564	36,586
Mollusks, live, fresh, chilled, frozen, dried	1,358,860	11,874	1,327,223	16,654	1,665,980	26,914
Aquatic invertebrates other than crustaceans and mollusks	9,860	0	10,653	0	6,338	0

Source: Global Trade Atlas

Exports

The top destination for Spanish fish and seafood in 2016 was the European Union. Within the EU, the main importers of Spanish fish and seafood were Italy, Portugal and France. Outside the EU, the largest importers were the United States and Japan. In 2016, Spanish exports increased by 9.4 percent in relation to those in 2015.

Table 12. Spain Exports of Fish and Seafood by Destination in Value ('000)

Country of origin	**2014**	**2015**	**2016**
EU-28	2,173,627	2,150,504	2,407,340
Italy	870,327	909,023	1,011,342
Portugal	642,363	577,146	630,128
France	329,602	335,680	364,770
Germany	58,971	62,700	88,999
United States	55,275	58,378	75,600
Japan	65,881	77,468	69,831
TOTAL EXPORTS	**3,036,951**	**2,874,879**	**3,146,238**

Source: GTA

Table 13. Spain Total Value of Exports of Fish and Seafood Products ('000 USD)

Category	**2014**	**2015**	**2016**
Live Fish	66,247	61,915	68,195
Fish, fresh or chilled, excl. fillets	555,393	521,517	524,277

Fish, frozen, excl. fillets	922,497	757,474	790,240
Fish fillets and other fish meat, fresh, chilled or frozen	322,520	343,873	392,569
Fish, dried, salted, smoked or in brine	94,374	97,276	111,341
Crustaceans, live, fresh, chilled, frozen, dried	371,681	376,995	402,850
Mollusks, live, fresh, chilled, frozen, dried	657,270	653,440	780,935
Aquatic invertebrates other than crustaceans and mollusks	3,467	7,172	5,578

Source: Global Trade Atlas

SECTION IV: FISH AND SEFOOD IMPORT REQUIREMENTS

As a general principle, seafood is imported into the EU from only approved countries and from approved establishments, e.g., processing plants, factory or freezing vessels, cold storages or brokers. Aquaculture products, including live bivalve mollusks, may be exported from only approved establishments located within approved production zones or areas.

Since 2006, the U.S. Seafood Inspection System has been recognized by the EU as equivalent to the European Seafood Inspection System. This status does not apply yet to the export of live bivalve mollusks, in whatever form. This mutual recognition facilitates seafood trade between the U.S. and the EU. Furthermore, it creates a framework under which Member States cannot impose national requirements on U.S. seafood exporters on top of EU harmonized legislation. However, differences of interpretation among Member States can lead to delays at border inspection posts.

For full details on how to export to the EU, please see the following guide:
Exporting Seafood to the European Union – October 2016 Update

For specific information on Spain, we invite potential U.S. exporters to contact the Office of Agricultural Affairs in Madrid at AgMadrid@fas.usda.gov for additional sector-specific information.

Current Tariff for Seafood Products

The EU is a customs union which means that 28 Member State customs administrations implement the Community Customs Code established by Council Regulation 2913/92. Commission Regulation 2454/93 lays down provisions for the implementation of the Code. These common rules cover all aspects of trade with third countries. All the Member States apply the same tariff on goods imported from outside the EU. The import duty rate is determined by the classification of a good in the EU Tariff Schedule (last update published in Official Journal L 312 – Oct. 31, 2014) and by the customs value.

"TARIC" is the acronym for the "Integrated Tariff of the European Communities" and was introduced at the same time as the CN coding system. The codes used are a further breakdown of the CN codes to the 10-digit level. The TARIC contains information on tariff quotas, all third country and preferential duty rates, tariff suspensions and other trade measures. TARIC does not have the status of a legal instrument but its 10-digit codes must be used in customs declarations. The EU's online customs database can be consulted to look up commodity codes and relevant import duties. Agricultural, food and fishery products are listed under chapters 1 to 24.

Market Entry Strategy

A health certificate issued by a government-approved veterinarian from the exporting country must accompany all fish shipments to Spain. Exporters should also check with Spanish importers regarding standards and labeling requirements.

For guidelines regarding seafood exports to Spain and the EU in general, information is available from the National Oceanic and Atmospheric Association, NOAA.

The NOAA oversees fisheries management in the United States. Under authority in the 1946 Agricultural Marketing Act, the NOAA Seafood Inspection Program provides inspection services for fish, shellfish, and fishery products to the industry.

Export Certification to the European Union

The NOAA Seafood Inspection Program certifies U.S. seafood products for export to the European Union. Instructions and requirements are available for both export health certification and IUU catch documentation required for export to EU Member Countries.

*Important Note: If products are first being exported to a non-EU country but will subsequently be exported to the EU, they MUST be accompanied by an IUU catch document.

For full details on how to export to the EU, please see the following guide:

Exporting Seafood to the European Union – October 2016 Update

SECTION V: FURTHER INFORMATION AND KEY CONTACTS

If you have any questions or comments regarding this report or need assistance in exporting to Spain, please contact the Office of Agricultural Affairs in Madrid:

Local Address:
Foreign Agricultural Service
Office of Agricultural Affairs
U.S. Embassy Madrid
Serrano, 75 – Box 20
28006 Madrid
Spain

U.S. Mailing Address:
Office of Agricultural Affairs
U.S. Embassy Madrid
PSC 61, Box 2000
APO, AE 09642

Tel.: +34-91-587 2555
Fax: +34-91-587 2556
Website: http://madrid.usembassy.gov/about-us/fas.html
Email: AgMadrid@fas.usda.gov

Please consult our home page for more information on exporting U.S. food products to Spain. Importer lists are also available from our office to exporters of U.S. food products. A list of trade associations and useful government agencies is provided below:

Spanish Trade Associations

FIAB - Federación de Industrias de Alimentación y Bebidas
(Spanish Federation of Food and Beverage Industries)
Website: www.fiab.es
Email: fiab@fiab.es

CONXEMAR - Asociación Española de Mayoristas, Importadores, Transformadores y Exportadores de Productos de la Pesca y Acuicultura
(Spanish Association of Wholesalers, Importers, Manufacturers and Exporters of fish products and Aquaculture)
Website: www.conxemar.com
Email: conxemar@conxemar.com

ANFACO-CECOPESCA – Asociación Nacional de Fabricantes de Conservas de Pescado (National Association of Manufacturers of Canned Fish and Shellfish)
Website: www.anfaco.es
Email: contacto@anfaco.es

CEPESCA – Confederación Española de Pesca
(Spanish Fisheries Confederation)
Website: www.cepesca.es
Email: cepesca@cepesca.es

Spanish Government Regulatory Agencies

Ministerio de Sanidad, Servicios Sociales e Igualdad
(Ministry of Health, Social Services and Equality)
(Responsible for: Imported Foodstuffs, Contaminants and Compound Residues, Health Certification, Port Inspection and EU Alerts)
Website: http://www.msc.es/profesionales/saludPublica/sanidadExterior/home.htm

Email: saniext@msssi.es

Agencia Española de Consumo, Seguridad Alimentaria y Nutrición (AECOSAN)
(Spanish Consumption, Food Safety and Nutrition Agency)
Website: www.aecosan.msssi.gob.es
Email: http://www.aesan.msssi.gob.es/SIAC-WEB/contacto.do?reqCode=newSearch

Ministerio de Agricultura y Pesca, Alimentación y Medio Ambiente
(Ministry of Agriculture and Fisheries, Food and Environment)
Website: www.mapama.gob.es
Email: informac@magrama.es

For more information on exporting U.S. agricultural products to other countries, please visit the Foreign Agricultural Service home page at www.fas.usda.gov